Family Wealth Plans

Our thoughtful estate planning packages provide varying levels of protection, suited to your unique needs and goals.

The Family Plan	The Trust Plan	VIP Membership
For the Family Who: ➤ Does not have assets that would require the court process called probate; ➤ Wants to guarantee their minor children are well cared for no matter what; ➤ Wants to ensure their health care wishes are carried out properly; ➤ Wants to know their money, property and other assets are managed properly if they become incapacitated.	For the Family Who: ➤ Wants total assurance of knowing your family wealth will be privately and conveniently transferred to your heirs; ➤ Wants to save their loved ones from the struggles and expenses of probate; ➤ Wants to protect their beneficiary's inheritance from lawsuits, creditors, spouses and estate taxes; ➤ Might have real estate and/or property in more than one County or State; ➤ Has minor children and/or children from prior marriages.	For the Family Who: ➤ Wants the total assurance and peace of mind of the Family Plan or Trust Plan *and* wants to leave behind a true legacy; ➤ Becoming a VIP Member will transform the way you make financial and legal decisions for your family going forward.
Your Family Plan Includes: ➤ **Wills**, **Health Care Directives**, **Powers of Attorney** and **Digital Assets Authorization**, so you know you and your loved ones are protected if you are incapacitated or upon your death; ➤ A **Kids Protection Plan®**, if you have minor children, to ensure your children are always raised by the people you want, in the way you want and never taken out of your home by the authorities; ➤ When appropriate, a testamentary trust to protect assets for young or financially immature beneficiaries.	Your Trust Plan Includes: ➤ Everything included in the Family Plan *plus* a **Revocable Living Trust**; ➤ The documents needed to help your family avoid or minimize probate and potential family conflict; ➤ The ability to keep your affairs totally private; ➤ Peace of mind knowing we analyze how each of your assets are titled and prepare documents to transfer title and change beneficiaries; ➤ Transferring real estate into your Trust; ➤ Assistance in transferring all of your assets into the Trust, with unlimited guidance and support from us.	Your VIP Membership Includes: ➤ All components of the Family Plan or Trust Plan; ➤ Ongoing Access to your Online Secure Client Folder; ➤ Up to 50% Off Routine Updates & Amendments; ➤ Up to 50% Off Incapacity Documents Package for Young Adult Children Through Age 24; ➤ Complimentary 3-Year Refresh of Power of Attorney; ➤ Complimentary Attorney Meeting with Your Family; ➤ Complimentary Family Wealth Legacy Questions and Interview; ➤ AND MORE!
FLAT FEE	**FLAT FEE**	**ANNUAL FLAT FEE**

Give your family what they deserve!

You will have the ability and peace of mind to call us with any questions or concerns you may have throughout the process, without worrying about whether you will be charged for making a call, thanks to our FLAT FEES which are based on the complexity of your plan.

In addition to our Family Plans and Trust Plans,
we also offer the following plans to adapt to your needs.

Empty Nester Plans

For Individuals and Couples Who:

- Do not have minor children or grandchildren;
- Have assets that would not have to go through probate
- Want to leave their assets outright to specific people;
- Want to ensure their health care wishes are turned into directives and that someone is able to access and manage their assets using a durable power of attorney if they become incapacitated.

The Empty Nester Plan includes your **Will**, **Health Care Directives, Powers of Attorney**, and **Digital Assets Authorization**, so you know that you are well taken care of if anything should happen to you.

FLAT FEE

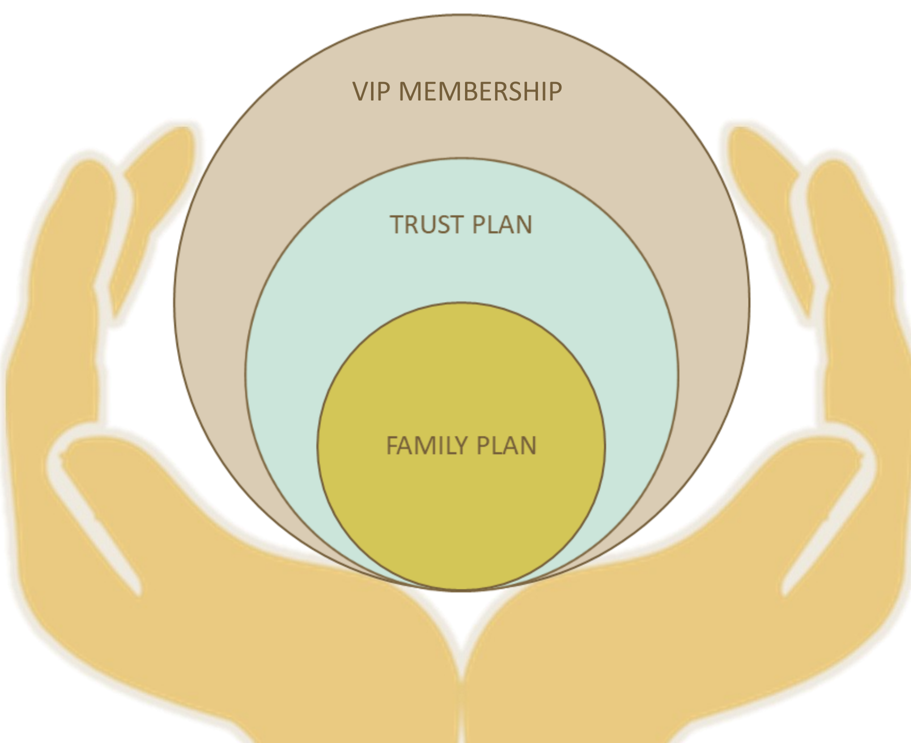
Young Adult Plans

For Young Adults Who:

- Are over 18 years old;
- Want to ensure their health care wishes are turned into directives and that their family is able to access and manage their assets using a durable power of attorney if they become incapacitated.

The Young Adult Plan includes:
Health Care Directives, **Power of Attorney**, **Digital Assets Authorization**, a **FERPA Waiver**, and an optional **Will**, and can be paired with any of our Family Plans or, Trust Plans.

FLAT FEE



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